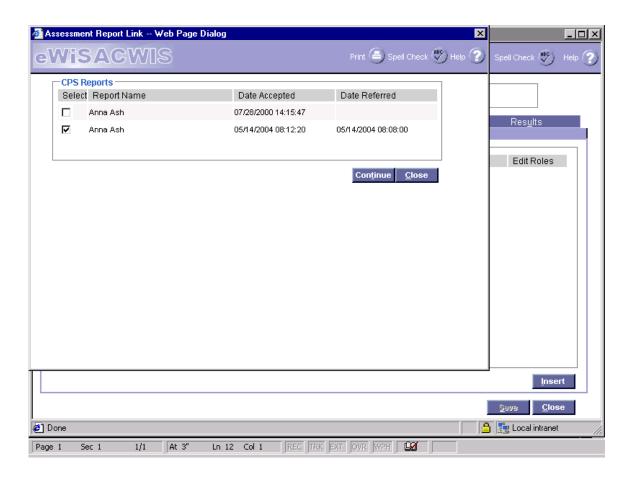
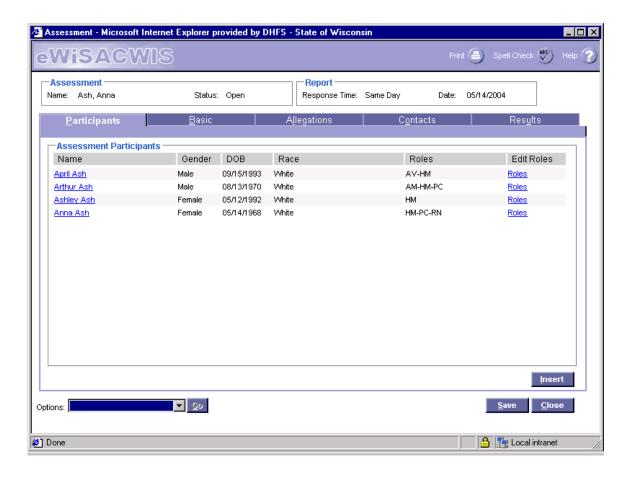
## **Initial Assessment – Secondary Caregivers**

- 1. From the desktop, go up to Create>Casework. From the Create Casework Page, select Assessment from the Assessment Icon and the family case. No participants are selected.
- 2. The next page will be the Assessment Report Link page. This page will show how many Protective Services and/or Services Intakes that need to be linked to an assessment. Select the radio button for the report(s) that are to be linked to this assessment and click continue.

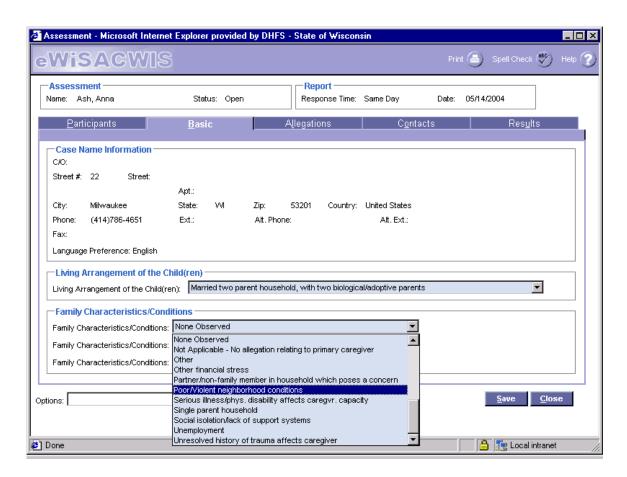


3. The Assessment page now opens. The Assessment and Report boxes at the top of the page will pre-fill with case name, case status, response time, and date. The remainder of the page consists of five tabs. The first tab is called the Participants tab. The Participants tab consists of demographic information that is carried over from the Intake. The participant's names are Hyperlinks. If individual information needs to be updated, click on their name and the system will open up the Person Management page for that individual (See Quick Reference Guide for Person Management). The Edit Roles Hyperlink will allow the case manager to edit the current roles for each individual. Finally, the insert button at the bottom of the page will allow additional participants to be added to the assessment. Click on insert and a Pop up

message box will open with other participants listed on the Intake. Click the Radio button next to the individuals you want to add to the assessment and click continue (no screen shot).



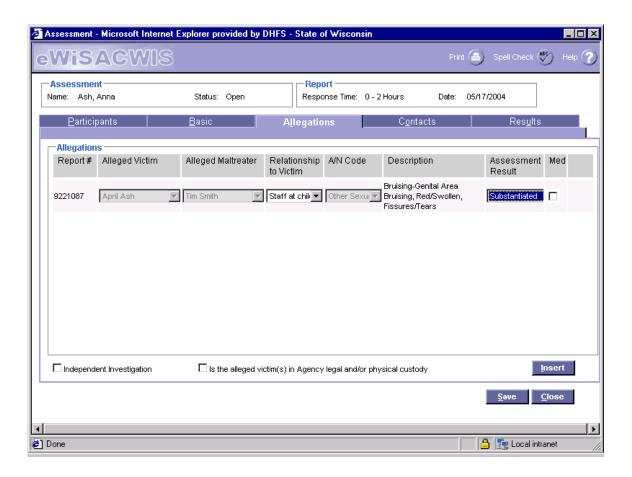
4. Click to the Basic tab. The Case Name Information Box will pre-fill with case demographics. The Living Arrangement of the Children Box is a drop down value. Select the appropriate value of the living arrangements of the children at the time of the assessment. Finally, the Family Characteristics consists of three drop down fields. Pick the values that best describes the family.



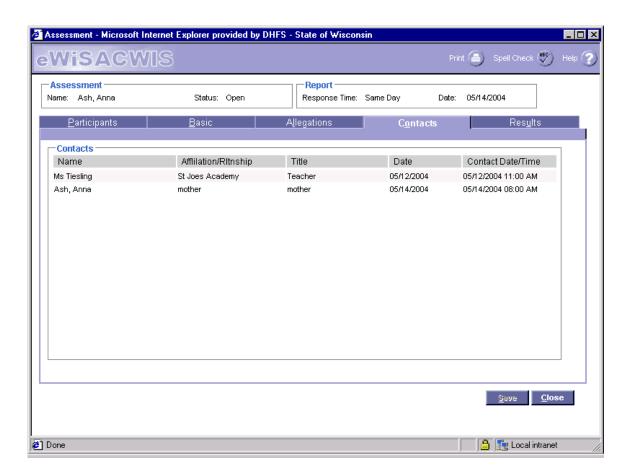
5. Click over to the Allegations Tab. The Allegations Tab will pre-fill with the alleged victim and alleged maltreater. The abuse/neglect code and description will also pre-fill from the Intake. The relationship to the victim is a drop down value. Select the appropriate value for the case. The assessment result is also a drop down value. Select the appropriate value. The Medical check box refers to if the child received medical attention for the injury received from the abuse.

The boxes below should be checked if the investigation is an Independent Investigation and/or the victim is legal or agency custody.

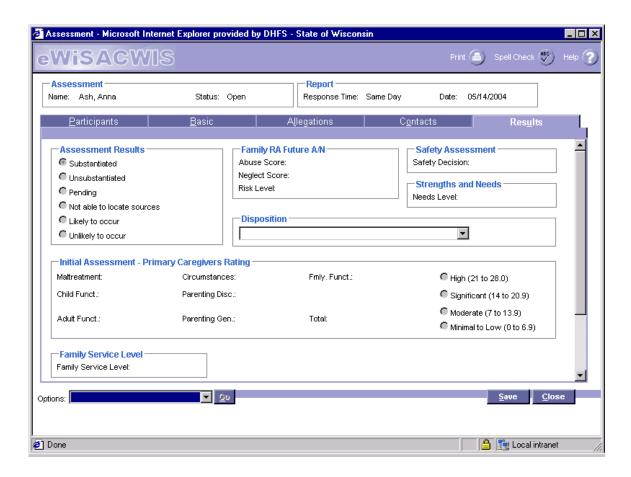
NOTE: It is important to complete the Assessment Result prior to supervisory final approval. If the Assessment Result is in Pending Status, the assessment can not be approved.



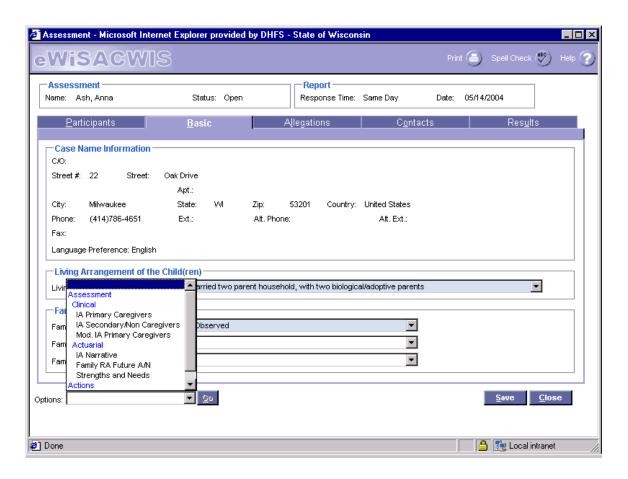
6. Now click over to the Contacts Tab. This is a view only tab. The Contacts will pre-fill from contacts that were documented in the system. See Quick Reference Guide on how to create Assessment Contacts and Initial Face to Face Contact.



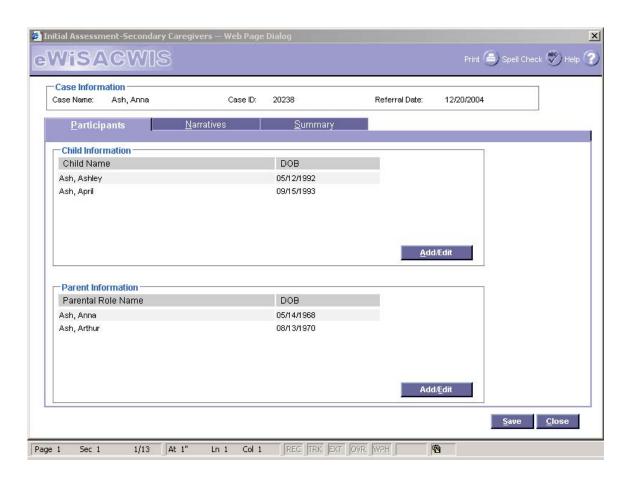
7. The last tab is the Results Tab. Click over to the Results Tab. At this point, the Results Tab does not have much information that pre-filled. We will come back to this tab later after the Narrative section of the assessment is completed.



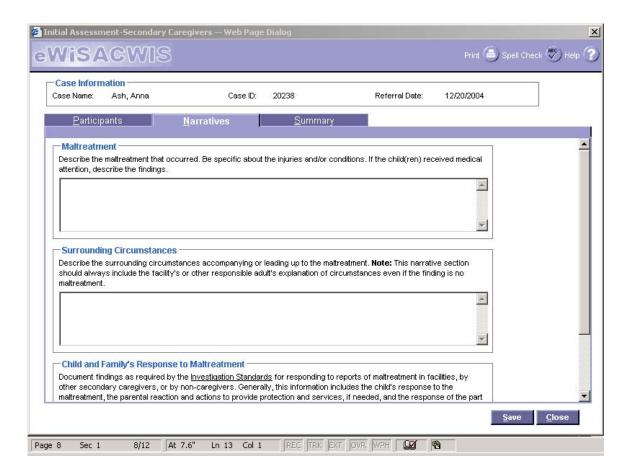
8. Now, let's go back to the Basic Tab. Under Options, there are different selections for Assessment. For this example, we will use Clinical – IA Secondary Caregiver. Click on the Go button.



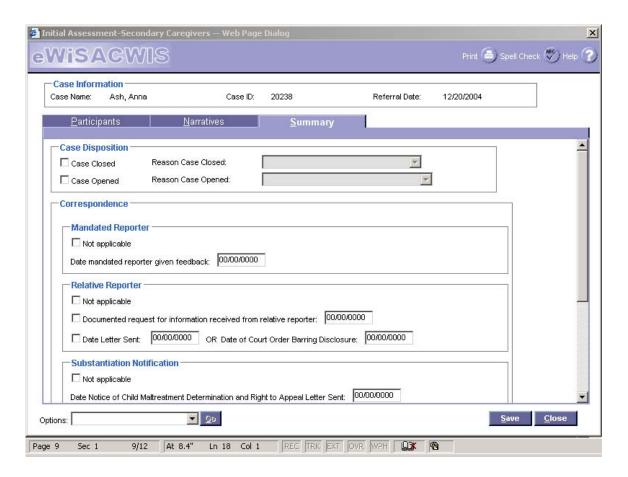
9. The Initial Assessment Secondary Caregivers Page will open. This page consists of three tabs. The first tab is Participant Information. This page is blank and will require the case manager to add participants to the Child Information field and Parent Information field. Use the add/edit buttons on each box to add the participants to whom the assessment applies. The add/edit button will bring up a pop up page. Check off the box to the corresponding participant that should be added to the assessment and click continue. (no screen shot)



10. Next, click on to the Narrative tab. The first box is Describe the Maltreatment. This is a free flow text narrative. The second box is another free flow text box Describing the Circumstance. The final free flow text box is Describe the Family and Child's response to the maltreatment.



- 11. Let's move on to the Summary Tab. The first box is the Case Disposition Box. Check off the appropriate box as to if the case will be open or closed and select the appropriate reason from the drop down value list.
- 12. The Correspondence Box documents the date in which a letter was sent to the Mandated Reporter and/or Relative Reporter. It also document the Licensing and Substantiation Notifications.
- 13. The final box is the Summary Box. This is a free flow text box used to document any comments by the caseworker or supervisor.



- 14. To print a copy of the assessment, go to the options box and select IA Secondary Non Caregivers. Click the Go button to access the document.
- 15. Click the Save and Close button to return to the Basic Tab of the Initial Assessment. Click over to the Results Tab. The Results Tab will now populate with information that was documented in the Initial Assessment. The Family R/A and Future A/N and Strengths and Needs box will not populate because they are not part of the Clinical version of the Initial Assessment Primary Caregivers.

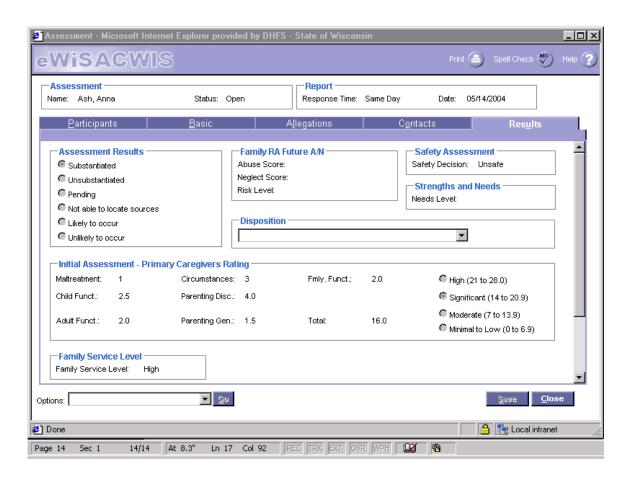
The Assessments Result box populates from the Allegations Tab > Assessment Results.

The Safety Assessment box will be blank because a Safety Assessment was not built into the IA Secondary Caregivers Assessment.

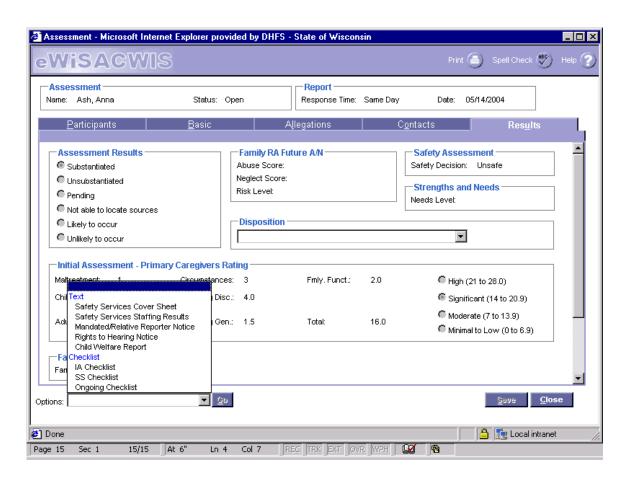
The Disposition Box is a drop down value field. Pick the appropriate value.

The Initial Assessment Primary Caregivers Rating populates from the Risk Ratings that were given for each category. None will populate because this assessment was not done for a Primary Caregiver.

The Family Service Level will populate based on the intensity level of work for this case.



16. The Options box has various text letters and check lists to access. See the list of options below.



17. You are finally ready to send the Initial Assessment on for final supervisory approval. Go to the Participants Tab, click on the Options field and select Approval. Click on GO to send for approval.

